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## ENGAGE

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Jun. 08, 2022



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Awards presented include the Stanley H. Breitbard Personal Financial Planning Division Lifetime Achievement Award, the Personal Financial Planning Distinguished Service Award, Standing Ovation awards for both Personal Financial Planning and Technology Advisory, and the Tom Austin Award.

“These award recipients represent the best of the best throughout the CPA profession

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Sidney Kess, CPA, received the Stanley H. Breitbard Personal Financial Planning Division Lifetime Achievement Award, which recognizes an individual who exemplifies a lifetime of significant contribution to the profession of personal financial planning, the accounting profession, and an ongoing commitment to volunteerism, the hallmark of a true professional.

Kess, of counsel to Kostelanetz & Fink in New York, was a pioneer in estate, tax, and retirement planning long before these topics came under the umbrella of personal financial planning and was among the first professionals to provide these services to his clients. Throughout his career, he has worked hard to elevate financial planning within the CPA profession and ensure its inclusion in AICPA and state CPA society conferences and publications. He has also worked tirelessly for the recognition of financial planning by universities nationwide.

Throughout his career, Kess has encouraged many CPA firms to embrace financial planning and has championed why this is critical to the profession's future. He has written several books and articles and has been at the helm of bringing financial planning into many prominent publications. He continues to feed his passion by thinking of new ways to expand awareness of the PFP Section and PFS credential and build a pipeline for future CPA financial planning professionals.

**Personal Financial Planning (PFP) Distinguished Service Award** Lisa Featherngill, CPA/PFS, was presented with AICPA's 2022 Personal Financial Planning (PFP) Distinguished Service Award, which recognizes an AICPA member who meritoriously contributes to the advancement of personal financial planning, best exemplifies a CPA financial planner and serves the public's interest by enhancing the quality of personal financial planning services.

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momentum and visibility after a challenging period of survival and has spent countless hours responding to and participating in media inquiries over the years, which that has led to increased awareness of CPAs as financial planners and the PFS credential.

She has presented in many conference sessions over the years representing PFP and currently serves as chair of the Advanced Estate Planning conference in her role as liaison to PFP.

### **Standing Ovation Honors**

The American Institute of CPAs is pleased to honor 10 CPAs, all age 40 and under, for contributions to their specialty area with the Standing Ovation award.

The AICPA's [Standing Ovation program](#) recognizes young CPAs who exhibit exemplary professional achievement in personal financial planning, business valuation and forensic accounting, and information management and technology assurance. Beyond making a notable contribution to the profession, nomination requirements include maintaining an active CPA license, being an AICPA member in good standing and holding either the Personal Financial Specialist (PFS), Certified Information Technology Professional (CITP), Certified in Financial Forensics (CFF), or Accredited in Business Valuation (ABV) credential.

### **Personal Financial Planning Standing Ovation**

The five recipients of the Personal Financial Planning (PFP) Standing Ovation all hold the PFS credential and were acknowledged during the [Advanced Personal Financial Planning track](#) at ENGAGE. They are (in alphabetical order):

- **Sarah Bradley, CPA/PFS**, Partner at Edwards Bradley, PC, Raleigh, NC

- **Akeiva Ellis, MSFP, CPA/PFS, CFP®, ChSNC ®, Financial Education Specialist**

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The five recipients of the 2022 Technology Advisory Standing Ovation award all hold the CITP credential and were recognized during the [Practitioners and TECH+ track](#) at ENGAGE. They are (in alphabetical order):

- **Samantha Boyd, CPA, CITP, Audit Supervisor, Virginia Auditor of Public Accounts, San Antonio, TX**
- **Cody Daughtry, CPA, CITP, Senior Audit Manager, Warren Averett, Montgomery, AL**
- **Natalie Luppold, CPA, CITP, CISA, CRCM, Member, Suttle & Stalnaker, PLLC, South Charleston, WV**
- **Blaise Wabo, CPA, CITP, CISA, CCSK, CCSFP, Healthcare and Financial Services Knowledge Leader, A-LIGN, Denver, CO**
- **Alexandria Welsh, CPA, CITP CISA, Manager, A-LIGN, Boca Raton, FL**

### **P. Thomas Austin Personal Financial Planning Scholarship**

Chris Wall, CPA/PFS, a private wealth manager at Creative Planning in Walnut Creek, CA, was awarded the 2022 P. Thomas Austin Personal Financial Planning (PFP) Scholarship.

CPAs who have fewer than 10 years of experience are eligible to be considered for the [scholarship](#), which covers the cost of attending the AICPA's Advanced Estate Planning Conference, as well as the related travel expenses. The AICPA established the scholarship in 2010 to honor P. Thomas Austin, a CPA who chaired the Advanced Estate Planning Conference for three decades and is currently chair emeritus.

Wall works directly with every client to build a unique roadmap that best fits their specific needs. He works with their in-house attorneys to draft trust, will and power of attorney documents that reflect their wishes. His estate planning philosophy goes

far beyond preparing and reviewing documents; he encourages his clients to discuss

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